PIC HELP NEWSBRIEF

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Inside This Issue

Attention All PIC Users

Bob Harmon

The purpose of the PIC News Brief is to share information of broader interest developed by answering user queries with the whole family of PIC users (all 10,000 of you). This newsletter will be sent to PIC Coaches by email and posted on the PIC Home Page for download by all interested users. We intend to produce it monthly for now with the option to increase the frequency if the need is there.

We welcome suggestions to improve the newsletter and, if you have a suggestion or a special topic you think needs to be covered, please send an email to robert_harmon@hud.gov and cc your response to tjones@mssi2000.com.

MSSI PIC Help Desk Analysts consist of the following team members:

1. Damien Brooks- Team Leader
2. Robert Murphy
3. Rosario Vasquez
4. Kermit Nored
5. Michael Swinton
6. Kevin Swinton

MSSI prides itself on its professional services provided by its Call Center staff. Excellent customer service is our ultimate goal and number one priority. Please feel free to contact the PIC Help Support team at PICHELP@hud.gov or call 1-800-366-6827.

Catapult Technology is the new maintenance contractor for the PIC system. Catapult believes in closely partnering with its Government clients to help them achieve success. For **HUD**, we provide management consulting, organizational transition and strategic planning services to the Office of the CIO.

To learn more about Catapult Technology and their services, visit the web site: http://www.catapulttechnology.com.

Coach's Tip—Adding HUD Users to the PIC system

How HUD Users are added to the PIC system.

"HUD User" accounts are created automatically in the PIC system, based on the biweekly interface with the PERIS system, which provides us a listing of all HUD staff that is listed as "Public Housing" field employees. Until the personnel systems report the individuals to PIC, they cannot be "HUD Users". Security Administrators must assign access rights to the new HUD user account.

Note: HUD Public Housing users are put in as PIC users automatically from the HUD payroll system. The PIC Security Administrator must add the other users (there is one assigned at every PHA).

- Select "PIC Maintenance" and "Security Administration"
- Select "HA User" (PHA staff only) or "Guest User (all other PHA contacts and the Public).
- Enter user information (Last Name, First name, Middle Name or Initial.
- User ID (system generated)= first initial (or "x") and first six or les last name in lower case (if User ID exists, system will add "01" and or next sequential number to ID when saving).
- If user does not have an e-mail address, enter none@email.com
- Initial password should ALWAYS be "password".
- Note: Once the user account has been created, the Security Administrator must grant access rights in the individual PIC sub modules before the user can access any useful information or do work in PIC.

Coach's Tip—A New HUD Employee

What to do with a new HUD employee until they become a HUD User?

We advise PIC Field Office Security Administrators to create a temporary "Guest User" account at the F.O. or HA level as appropriate and use a variation of the person's name so they won't automatically get

For example, create a temporary guest user account for "jerry O. Wilhoit" using "Jerry Q. Wilhoyt" (note the different spelling). His temporary User ID will be "jqwilhoy". Then, when ESC gets done and his HUD User account appears, it will not get a "01" added to "Jowilhoi". You should then de-activate the temporary account. The requirement for HUD user to be automatically validated by the payroll system was a requirment of the OIG. (<u>Note that although the system automatically adds a "HUD User", it does not automatically give them any rights except to change their password.)</u>

COACH TIP

PIC Coaches are encouraged to submit subject areas that are prudent and essential for other PIC Coaches and new staff.
Please forward suggestions to tjones@mssi2000.com.

How can I change or grant user's access in PIC?

New users have no rights in PIC sub modules until the Security Administrator specifically assigns rights to them.

- Access the PIC Security Administration sub module.
- Select applicable module and sub module (from pull down lists).
- Chooser "Add role"
- Add the appropriate role from the pull down list. **Note: Never use "Super User" if it is offered.**
- Select security Type ("Field Office HA" for HA users and guest users).
- Highlight in blue the HA Code and the HA Name by clicking it.
- Click "Save" to complete adding the role.
- Repeat for all sub modules that are needed.
- To remove a role, put a check mark in the box under "Remove" then click "remove role" and confirm it when asked.
- Security Administrators must maintain documentation for all security changes.

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We advise PIC Field Office Security Administrators to create a temporary "Guest User" account at the F.O. or HA level as appropriate and use a variation of the person's name so they won't automatically get a "01" added to their permanent account.

For example, create a temporary guest user account for "jerry O. Wilhoit" using "Jerry Q. Wilhoyt" (note the different spelling). His temporary User ID will be "jqwilhoy". Then, when ESC gets done and his HUD User account appears, it will not get a "01" added to "Jowilhoi". You should then de-activate the temporary account. The requirement for HUD user to be automatically validated by the payroll system was a requirment of the OIG. (Note that although the system automatically adds a "HUD User", it does not automatically give them any rights except to change their password.)

COACH TIP

When PIC Coaches and Housing Authorities can not get into the system, the following info. needs to be forwarded to PIC Help:

-How far did the user get before the got stopped?
-Did they get the log in screen?
-Did they get an error message?
-Were they able to fill in the login screen?

Coach's Tip—RASS Report address problems

How to resolve RASS Report address problems?

PIC stores these addresses in three locations:

1. The building physical address in the PIC Development sub module.
2. The tenant physical address in the PIC Form 50058 sub module (Field 5a)
3. The tenant mailing address (Field 5c)

1. What is the tenant program type?
   a. Section 8: Go to 4.
   b. Public Housing: Go to 2.

2. Do you want to change Public housing tenant's Physical address?

   a. If Yes: Edit the appropriate building entrance address in the PIC development sub module. <u>(When all physical address changes for public housing have been made and saved, you must "Submit" the data to the HUD Field Office for approval so it will be permanently changed in the official inventory</u>).

   b. If No: Go to 3.

3. Do you want to change Public housing tenant's Mailing address?

   a. Yes: Is mailing address same as Unit Physical address?

      i. If Yes: Make sure that you have Line 5B = Y for the current tenant record in the MTCS database
      ii. If No: Mailing address must be submitted by successfully uploading a Form 50058 with line 5b= Y and the correct mailing address in Line 5c via the PIC Form 50058 submission sub module.

4. Do you want to change Section 8 tenant's Physical address?

Yes: Physical address must be submitted by uploading a Form 50058 with the correct Physical address in line 5a via the PIC Form 50058 submission sub module.

5. Do you want to change Section 8 tenant's Mailing address?

   a. If Yes: Is mailing address same as Unit Physical address?

      i. If Yes: Make sure that you have Line 5b = Y for the current tenant record in the MTCS database
      ii. If No: Mailing address must be submitted by successfully uploading a Form 50058 with line 5b= Y and the correct mailing address in Line 5c via the PIC Form 50058 submission sub module.

Coach's Tip—New PIC Data Source for PIC Coaches and HUD staff

How do I access the "PIC Data Page"?

Many coaches have asked for additional access to PIC data for use outside of PIC. Administrators have just created the "PIC Data Page" in hud@work (hudweb). PIC Coaches can reach the "PIC Data Page" from within HUD at: http://hudweb.hud.gov/po/p/systems/pic/picdata.htm.

Please note: this is **NOT AVAILABLE TO THE PUBLIC** at this time. HUD staff dialing into the HUD network that can access hud@work (our intranet) can access this from wherever they are dialing in. In addition, these spreadsheets are very large so we recommend you download from within the office rather than via dialup connections when you are traveling, if possible.

All data is in the form of MS Excel spreadsheets, which have auto filter enabled so the user can select a subset of data based on values from any column. You must scroll to the top line of the spreadsheet to use the auto filter pull-down feature.

There currently are the following choices, which will be updated weekly beginning the last week in January:

Addresses

- PHA Addresses
- Executive Directors Addresses
- Board of Chair Addresses

PHA Executive Summary

- PHA Units Inventory
- PHA Funding
  - Formula Grants
  - Section 8 Grants
- PHA Contacts/Staff
- PHA PHAS Performance
- PHA SEMAP Performance

PHA Capital Fund

- FY98-02 Unobligated Funding (excludes RHP)
- FY99-02 Unobligated Funding (RHP only)
- FY89-97 Unobligated Funding
- FY98-02 Unexpended Funding (excluding RHP)
- FY89-97 Unexpended Funding

PHA SEMAP Detail

- PHA FYO1 SEMAP Performance
- PHA SEMAP Exception List

PHA PHAS Score Detail

- PHA PHAS Score Detail

PHA Risk Assessment

- PHA Risk Assessment Scores

COACH TIP

PIC Coaches can submit ideas/suggestions for the new PIC Data Source to Bob Harmon.

How Risk Assessment Works

The PIC Risk Assessment sub module works on the concept of an annual baseline of *quantitative* risk data and a local and national ranking of PHAs at the beginning of the fiscal year with explicit quarterly updates of *quantitative* risk data and ongoing quarterly adjustments to management judgments and office strategies.

In an ideal year, the annual baseline of *quantitative* risk scores would be run in late July or early August so Field Offices could review the data and prepare annual plans for the subsequent federal fiscal year beginning October 1. Thereafter during the fiscal year, the *quantitative* factor data would be updated at the beginning of each quarter into a separate quarterly risk assessment record with updated national and local rankings and *qualitative* factors and office strategies rolled forward.

Field management can make quarterly adjustments to the *qualitative* factors and its travel and intervention plans as needed. The various quarterly risk assessment records should be compared to the fiscal year baseline to determine what plan changes had been made and when during the year.

Risk Assessment Through the Fiscal Year

In a normal year, the risk assessment process begins before the October 1st start of the Federal Fiscal Year (FY) and proceeds with to the following steps:

1. The initial run of *quantitative* factor data is produced in late July/early August in PIC.
2. The Field Office Staff and Management review the data and identify any *qualitative* factors that are applicable. These are entered into the system.
3. Field Office Management then review the combination of *quantitative* rankings and *qualitative* factors to determine office strategy. Starting with the highest-ranking PHA, Management assigns office strategies to each PHA at the high-risk level until resources are exhausted.

If the PHAs are all high-risk and ranked in that order, on-site assistance would be assigned to the highest-risk PHAs first until travel resources were gone, then remote assistance to the next highest risk PHAs until staff resources were fully engaged.
Any departures from the risk rankings must be justified and documented with a combination of *qualitative* factors and comments. "Departures" are defined as office strategy selections that do not occur sequentially in diminishing order of serious in the rankings.
In this example, "C" was reduced to "Remote Assistance" even though it ranked higher than "D". This is a departure and must be documented and fully justified.

PHA	Risk Score	Ranking	Office Strategy
"A"	77.0	1	On-site assistance
"B"	74.3	2	On-site assistance
"C"	73.1	3	Remote Assistance
"D"	65.0	4	On-site assistance

Unjustified and undocumented departures from the risk rankings are serious discrepancies and will be dealt with accordingly. All "On-Site Assistance" and "Remote Assistance" office strategies should be entered as events in the Event Tracking sub module of PIC when the strategies are assigned and the Assistance Plan becomes part of the annual management plan for the Field Office.

For each subsequent quarter, the PIC system will save the previous quarter's data then recalculate the *quantitative* risk rankings at the beginning of the quarter. The above process is then repeated to take into account any significant changes in the data. New office strategies may be assigned as warranted and as resources permit. Additional departures must be fully justified and documented. Changes must also be reflected in PIC Event Tracking.

If a Field Office finds it has insufficient staff and travel resources to cover all of its high-risk PHAs, Field Office Directors should call on their assigned Desk Officer to identify any additional resources that may become available.

Q: PHA is trying to submit their SEMAP certification but the ED (Executive Director) does not have a submit button. Is it too early to submit the certification?

A: PHA may have not answered indicator 15 because it did not apply to them. This would cause them to not receive the submit button. They still have to answer it, either by saying no or N/A even though it may not apply to them.

Q: What are the allowable DERS grant statuses?

A: There are four grant statuses:

1. **Open**- HA users need to submit the current Semi-annual report.
2. **Non-Compliant**- HA Users need to submit all outstanding semi annual reports, in addition to the current semi-annual report.
3. **Administration Necessary**- Field office users need to ensure that the pre-audit date is updated in LOCCS. No action is required by the HA user.
4. **Closed**- No action is required by the HA user.

Q: What does the Grant Status Non-Compliant mean? What should I do if I have a grant in that status?

A: Non-compliant means that all required reports have not been approved. Housing Authority personnel should verify which reports are missing, and submit these reports as soon as possible. Field Office personnel should review the reports that have been submitted, and either reject or approve them. The Field Office needs to help bring the Housing Authority into compliance.

Q: What is the proper procedure for merging units in PIC?

A: A “merged unit” occurs when the number of public housing units in a building is changed by structurally combining two or more smaller units into one larger unit. For example, two 1-bedroom units might be combined into a 3-bedroom family unit. Merged units only occur when the building is permanently changed by remodeling or rebuilding. The “merged” unit is the one that ceases to exist as a separate unit. (It becomes a “ghost” unit). Merging units DOES NOT require resetting Building & Unit data to “draft”.

Example: Unit 9 (1-bedroom elderly) and Unit 11 (2-bedroom family) are merged into one 4-bedroom family unit. The merged unit is assigned the unit number of either one of the units being merged. Let's say the PHA wants to use the number 9 for the 4-bedroom unit. The PHA would change Unit 9 to a 4-bedroom family unit in PIC and would change unit 11 to a "merged" unit type. The PHA saves its work and then submits it to HUD for approval. HUD reviews the entries for accuracy and approves it or rejects it. If it is approved, the "official inventory" of buildings and units is updated. If it is rejected, the PHA corrects the error to the Field Office's satisfaction, then resubmits it to HUD. "Merged" units (unit type = "merged") are removed from the vacancy count and the various development and building subtotals when they are approved by HUD. "Merged" units do not count against vacancies and are only retained as a record of what was previously listed in the ACC.

Q: What is the maximum 50058-submisson-file size that a PHA can upload?

A: 5 MB maximum recommended file size. This ensures you will not time out on the upload or when downloading the MTCS error report.

PIC ANNOUNCEMENTS

I. User Guides in Development

The following user guides have been posted on the PIC home page:

1. Executive Summary User Manual
2. Demolition Disposition User Manual

User guides that will soon be completed and posted in fiscal two:

1. FORM 50058 User Manual
2. Risk Assessment User Manual

II. Features in the 4.0 Release

1. There is the ability to transfer a block of vouchers from one PHA to another.
2. There were errors while downloading Error Reports. This has been corrected.
3. All non-alternate ID's that contain A-Z have been removed from the database.
4. There is a data fix to recover the FSS details. This may not be fixed as of yet.
5. The duration for the MTCS report is now 16-months.
6. The online EOP problem has been fixed with the overlapping of dates.
7. Added historical adjustments to summarization.
8. Several minor changes to SEMAP were made in the field process with the comment window. One additional capability has not been included in this version.
9. All of the major problems with Form 50058 were fixed.

Click on the following link to learn more about Release 4.0:
http://www.hud.gov/offices/pih/systems/pic/news/picrelease4_0overview.cfm

III. Changes in HUD personnel

Bob Harmon explained the new changes in management:

1. **Dr. Lou Blazy,** the previous DAS and CFO, has been detailed to the CIO office as the Sr. Special Advisor.
2. **Robert Dalzell** is the now the acting DAS.

Please submit comments/suggestions regarding content and format to:

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